12. Participant Changes

The functions in this chapter allow the user to make changes for the participant that occur after the certification attempt and do not necessarily pertain to direct WIC benefits delivery.

12.1 EBT Household Change Guided Script

The EBT Household Change Guided Script allows the user to transfer participants from an existing household and into a new one. If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, the transfer process requires that the current account balance be evaluated to determine if the participant has outstanding issued foods in the current household. The EBT Household Change Guided Script directs the SPIRIT user through a series of dialogs to aid in the transfer of benefits from one household to the next. The EBT Household Change Guided Script is invoked when the user selects the Change Household ID menu item from the Participant Activities menu in EBT-enabled clinics.
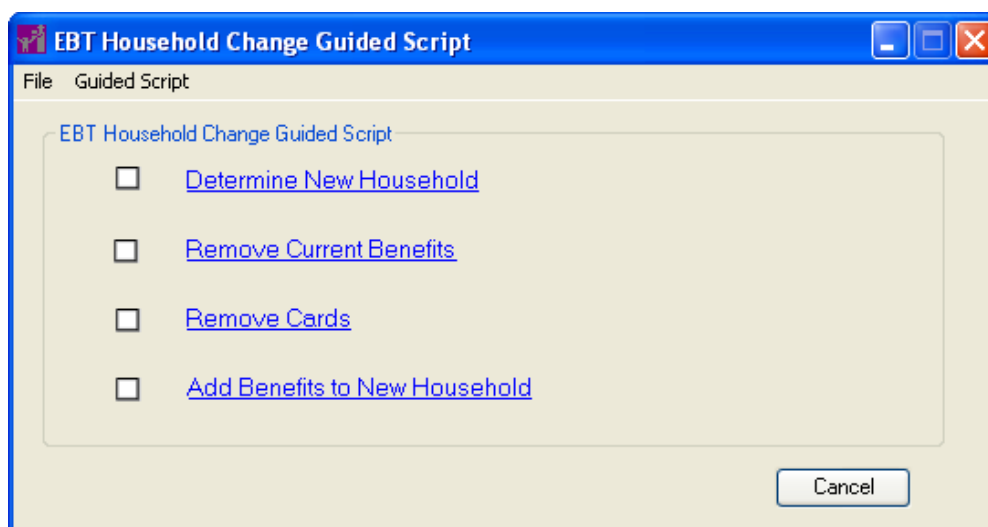

Figure 1 – EBT Household Change Guided Script Dialog

12.1.1 Controls

This section describes the behavior of the controls on the EBT Household Change Guided Script dialog.

12.1.1.1 EBT Household Change Guided Script Links and Check Boxes

A link for each step in the EBT Household Change Guided Script will be displayed. A system-controlled check box will be displayed to indicate whether or not the link has been accessed.

The links on the EBT Household Change Guided Script are displayed as follows:

- Determine New Household

- Remove Current Benefits

- Remove Cards

- Add Benefits to New Household

All links are visible and enabled when the EBT Household Change Guided Script dialog is active.

The EBT Household Change Guided Script steps must be completed in the listed order.

The icon displayed with the link is determined by the value displayed for that item in the GSControl table. If the value = 'Y', an icon of a check box with a check will display. If the value = 'N', an icon of an empty check box will display.

The check box is not an updatable control. The control can only be modified by the system.

The EBT Household Change Guided Script dialog will refresh the icons each time it gets focus.

12.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Household Change Guided Script dialog.

12.1.2.1 Determine New Household

Upon selection of the Determine New Household link, the system will invoke the Change Household ID dialog as described later in this document.

After the Change Household ID dialog is closed, the system will invoke the EBT Household Demographics dialog as defined in Clinic Chapter 11 - Food Instrument Production.

At this point, a record will be created in the HouseholdChange table, but the MEMBER record will not be updated. It is necessary for the participant to remain in the old household until benefits have been removed and any applicable cards have been disabled.

12.1.2.2 Remove Current Benefits

Upon selection of the Remove Current Benefits link, the system will update the benefit balance in the EBT system. When a participant is transferring out of an existing household and has remaining benefits available, their share of the household's aggregated total will transfer with them to the new household. In order to complete this transfer, benefits must first be removed from the initial household.

If no benefits are currently assigned to the household, the system displays a dialog with the text, "There are no benefits eligible to be removed". Clicking OK returns the user to the EBT Household Change Guided Script dialog.

If benefits are currently assigned to the household, the system determines the balance available for transfer by counting the number of participants that were issued benefits in the category/subcategory and then dividing the quantity remaining by this count. The value is then rounded down. The number available to the transferring participant is removed from the aggregated household total and the Void/Replace Benefits for EBT Account dialog displaying the suggested household update is invoked, as described later in this document.

12.1.2.3 Remove Cards

Upon selection of the Remove Cards link, the system will invoke the EBT Household Demographics dialog as defined in Clinic Chapter 11 - Food Instrument Production.

If the transferring participant has an Authorized Representative who has been issued an EBT card and will no longer represent the family, then this Authorized Representative and any card issued them must be deactivated in the EBT system.

If the transferring participant has been assigned a card, then the card must be deactivated or assigned to another household member/Authorized Representative in the EBT system.

Once the participant and/or proxy have been removed from the old household, they are eligible to be added to the new household. This is a behind the scenes task that will commit the new HouseholdID to the MEMBER record.

12.1.2.4 Add Benefits to New Household

Upon selection of the Add Benefits to New Household link, the system will attempt to issue benefits to the new household for the transferring participant. This is the final step in the EBT Household Change Guided Script process.

If there were no benefits eligible to be removed from the previous household, the system displays a dialog with the text, "There are no benefits to issue because there were no benefits voided from the old household". Clicking OK returns the user to the EBT Household Change Guided Script dialog.

If benefits were assigned to and voided from the previous household, the system will invoke the Aggregated Issuance for EBT Account dialog, as defined in Clinic Chapter 11 - Food Instrument Production. This dialog displays the transferred amount totals that are now available for issuance in the new household. This will be treated as a new issuance in the EBT system.

12.2 Change Household ID

The Change Household ID dialog allows the user to change the Household ID of the participant. The new Household ID can belong to an existing household, or the user can create a new household to assign to the participant. Additionally, the user may view the history of Household ID changes for the participant. The Change Household ID dialog is invoked when the user selects the Change Household ID menu item from the Participant Activities menu in non-EBT enabled clinics. For EBT-enabled clinics, this dialog is invoked when the user selects the Determine New Household link from the EBT Household Change Guided Script.

Figure 2 - Change Household ID Dialog

12.2.1 Controls

This section describes the behavior of the controls on the Change Household ID dialog.

12.2.1.1 Household ID Text and Value Label

The control displays the Household ID of the household to which the participant is currently assigned. The value label will be filled with the value of the Household-ID column of the MEMBER table. The value displays in the inverse color of the form.

12.2.1.2 Address Text and Value Label

The control displays the residence address of the household to which the participant is currently assigned. The value label will be filled with the value of the Address column of the HOUSEHOLD table. The value displays in the inverse color of the form.

12.2.1.3 City Text and Value Label

The control displays the residence city of the household to which the participant is currently assigned. The value label will be filled with the lookup value of the Legal-Municipality column of the HOUSEHOLD table. The value displays in the inverse color of the form.

12.2.1.4 Telephone 1 Text and Value Label

The control displays the first telephone number of the household to which the participant is currently assigned. The value label will be filled with the value of the Telephone-1 column of the HOUSEHOLD table. The value displays in the inverse color of the form.

12.2.1.5 Find Existing Household Button

The control begins the process of finding an existing household to which to assign the participant. It is enabled when the dialog is active. Its mnemonic is "E".

12.2.1.6 Create New Household Button

The control begins the process of creating a new household to which to assign the participant. It is enabled when the dialog is active. Its mnemonic is "N".

12.2.1.7 View ID Change History Button

The control displays the history of Household ID changes for the participant. It is enabled when the dialog is active. Its mnemonic is "V".

12.2.1.8 Close Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in the Consistencies chapter.

12.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Change Household ID dialog.

12.2.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text will be set to "Change Household ID"

- The Household ID value label is populated from the Member.HouseholdID for the participant.

- The Address value label is populated from Household.Address for the participant.

- The City value label is populated with the literal value from the look update database from Household.City for the participant.

- The Telephone 1 value label is populated from Household.Telephone1 for the participant.

12.2.2.2 Find Existing Household

Then the Find Existing Household button is selected, the Select Existing Household dialog defined in this document is invoked. When the Select Existing Household dialog is successfully processed, the value of the Household ID label is updated.

12.2.2.3 Create New Household

When the Create New Household button is selected, the Create New Household defined in this document is invoked. When the Create New Household dialog is successfully processed, the value of the Household ID label is updated.

12.2.2.4 View History of Household ID Changes

When the View ID Change History button is selected, the View Household ID Change History dialog defined in this document is invoked.

12.2.2.5 Close Button

When the Close button is selected, a check is performed to see if the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

- If the EBT system is enabled, the EBT Household Demographics dialog as defined in Clinic Chapter 11 - Food Instrument Production will be invoked.

   o If the EBT Household Demographics dialog is canceled, or the demographics information cannot be transmitted successfully, the Changing the Household ID process is terminated and a standard error dialog is invoked with the text, "The change was not saved because the EBT communication was canceled." When the error dialog is dismissed, focus is returned to the Change Household ID dialog.

- o If the EBT Household Demographics dialog is processed and the demographics information is transmitted successfully, focus is returned to the EBT Household Change Guided Script and the process is continued as detailed in the EBT Household Change Guided Script section above.

- If the EBT system is not enabled, the dialog will be dismissed and the user will return to the Participant Folder.

12.3 View History of Household ID Change

The View Household ID Change History dialog displays the history of Household ID changes that have been made for the participant. This dialog is invoked when the user selects the View ID Change History button on the Change Household ID dialog.
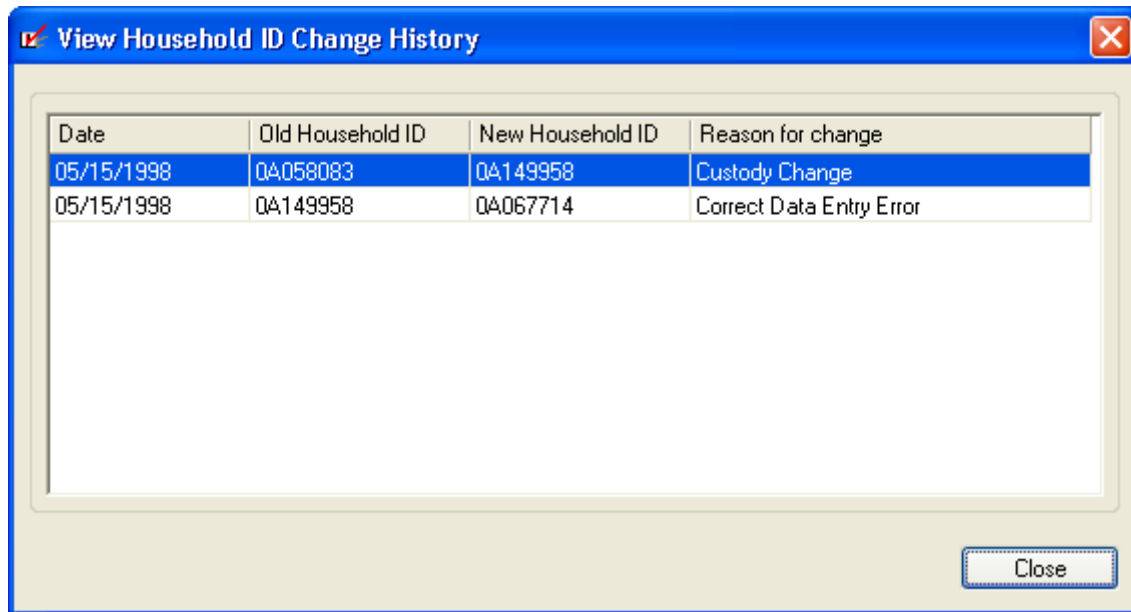

Figure 3 - View Household ID Change Dialog

12.3.1 Controls

This section describes the behavior of the controls on the View Household ID Change dialog.

12.3.1.1 ID Change History Display Grid

The control displays the history of Household ID changes that have been made for the participant. It is enabled when the dialog is active. It includes the following columns:

- Change Date (Date)
- Old Household ID
- New Household ID
- Reason for Change

The grid will contain an entry for each Household ID change recorded for the participant. The entries will be sorted in reverse chronological order according to the contents of the Change Date column. The values are read-only.

12.3.1.2 Close Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Close button are defined in the [Consistencies] chapter.

12.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Change Household ID dialog.

12.3.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text will be set to "View Household ID Change History"

- An entry will be added to the grid for each entry for the participant in the HouseholdChange table. The View Household ID Change History data grid displays the following values:

    o Date (HOUSEHOLDCHANGE.CREATEDATE)

    o Old Household ID (HOUSEHOLDCHANGE.OLDHOUSEHOLDID)

    o New Household ID (HOUSEHOLDCHANGE. NEWHOUSEHOLDID)

    o Reason for Change (HOUSEHOLDCHANGE.CHANGEREASON)

12.4 Find Existing Household

The Find Existing Household dialog allows the user to search for a household in the Existing Household data grid on the Select Existing Household dialog. It is invoked when the user selects the Find button on the Change Household ID or Select Existing Household dialog.
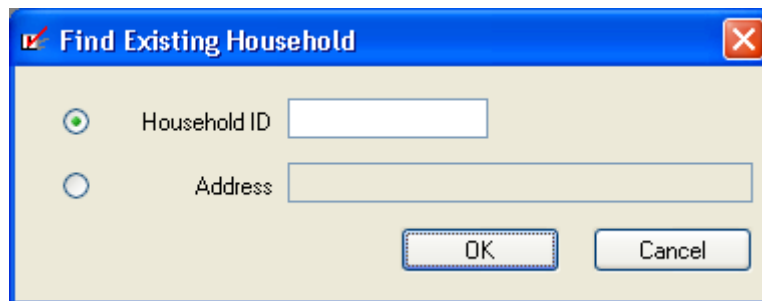

Figure 4 - Find Existing Household Dialog

12.4.1 Controls

This section describes the behavior of the controls on the Find Existing Household dialog.

12.4.1.1 Search Criteria Radio Button Group

The control allows the user to select the type of information to search for the existing household. The radio button group is enabled when the dialog is active. It includes the following radio buttons:

- Household ID
- Address

The Household ID radio button will default to selected.

When the Household ID radio button is selected, the Residence Address text box is cleared and disabled. When the Address radio button is selected, the Household ID masked edit box is cleared and disabled.

12.4.1.1.1 Household ID Masked Edit Box

The control accepts the entry of the Household ID of an existing household for which to search in the Existing Households data grid of the Select Existing Household dialog. It is enabled when the Household ID radio button is selected. It accepts the entry of alphabetic and numeric characters. The mask on the box is "########". It will default to blanks.

12.4.1.1.2 Residence Address Text Box (Address)

The control accepts the entry of the residence address of an existing household for which to search in the Existing Households data grid of the Select Existing Household dialog. It is enabled when the Address radio button is selected. It will force all entered characters to upper case. The maximum length allowed for the value is fifty (50) characters. The control will default to no entry.

12.4.1.2 OK Button

The control processes the dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

12.4.1.3 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

12.4.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Find Existing Household dialog.

12.4.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text will be set to "Find Existing Household"

- The Household ID radio button will be initially selected

12.4.2.2 Edit for Required Entry in Controls

When the OK button is selected, a check is performed to verify that values have been entered the following controls:

- Search Criteria radio button group

If an entry is not made in one of the above-listed controls, a standard error dialog is invoked with the text, "An entry is required in one of the {descriptive name of the control}".

12.4.2.3 Edits

When the edits listed above have been completed successfully, a check is performed to verify that legitimate values are entered in the controls as follows:

The value of the Household ID masked edit box must be valid.

Only characters A-Z, 0-9 and {space}, and the following characters (**' . - #
/**) are allowed in the value of the Residence Address text box if a value
has been entered into the control.

When the edits listed above have been completed successfully, the system
will perform the following cross-edits:

- If the Household ID radio button is selected, the Household ID
  masked edit box must have a legitimate value.

- If the Address radio button is selected, the Residence Address text
  box must have a legitimate value.

12.4.2.4 Search on Household ID

When the edits listed above have been completed successfully, if the
Household ID radio button is selected the system will search for an
existing household with the Household ID equal to the value specified in
the Household ID masked edit box.

If the system finds a match, it will select the appropriate entry in the
Existing Households data grid on the Select Existing Household dialog
and exit the Find Existing Household dialog.

If the system does not find a match, it will invoke a standard error
message with the text "No household record was found matching
specified criteria." and will return to the Find Existing Household dialog.
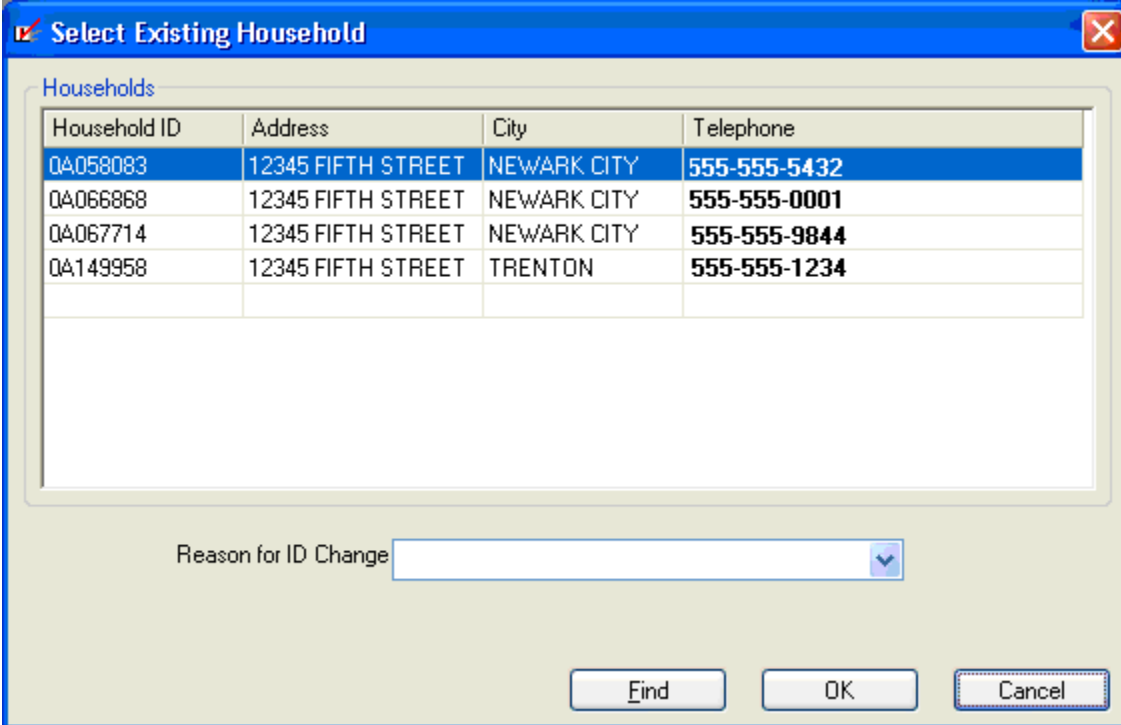
12.4.2.5 Search on Residence Address

When the edits listed above have been completed successfully, if the
Address radio button is selected the system will search for an existing
household with a residence equal to the value specified in the Residence
Address text box up to the number of characters specified.

If the system finds a match, it will select the appropriate entry in the
Existing Households data grid on the Select Existing Household dialog
and exit the Find Existing Household dialog.

If the system does not find a match, it will invoke a standard error
message with the text "No household record was found matching
specified criteria." and will return to the Find Existing Household dialog.

12.5 Select Existing Household

The Select Existing Household dialog allows the user to select an existing household to which the participant should be assigned. It is invoked when the user selects the OK button on the Find Existing Household dialog.

Figure 5 - Select Existing Household Dialog

12.5.1 Controls

This section describes the behavior of the controls on the Select Existing Household dialog.

12.5.1.1 Existing Households Display Grid (Households)

The control allows the user to select an existing household to which the participant should be assigned. It is enabled when the dialog is active. It includes the following columns:

- Household ID

- Residence Address (Address)

- Residence City (City)

- Telephone 1 (Telephone)

The grid will contain an entry for each household that met the criteria within the system. The entries will be sorted according to the value of the Household ID. The values are read-only.

12.5.1.2 Reason for ID Change Drop-down List

The control allows the user to select the reason the Household ID of the participant is being changed. It is enabled when the dialog is active. The list includes valid reasons to change the Household ID of the participant from the reference dictionary table of the lookup database. It defaults to blank.

12.5.1.3 Find Button

The control allows the user to display the Find Existing Household dialog. It is enabled when the dialog is active. Its mnemonic is "F".

12.5.1.4 OK Button

The control processes the dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

12.5.1.5 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

12.5.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Select Existing Household dialog.

12.5.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text will be set to "Select Existing Household"

- The first entry in the Households data grid will be initially selected.

- The entries in the Households data grid will be sorted in numeric order according to the Household ID column.

- An entry will be added to the grid for each Household ID that meets the search criteria specified on the Find Exiting Household ID. The Household data grid displays the following values:

    o Household ID (HOUSEHOLD.HOUSEHOLD.ID)

    o Address (HOUSEHOLD.ADDRESS)

       o   City (HOUSEHOLD.CITY)

       o   Telephone (HOUSEHOLD.TELEPHONE1)

- The Reason for ID Change drop-down list will be initially blank.

12.5.2.2 Finding an Existing Household

When the Find button is selected, the system will invoke the Find Existing Household defined in this chapter.

12.5.2.3 Changing the Household ID

When the OK button is selected, the following processes are started:

12.5.2.3.1 Verify Required Information

A check is performed to ensure required information is provided:

- If the Reason for ID Change drop-down list does not contain a value, a standard error dialog is invoked with the text, "A selection is required for the {name of control}".

- If a selection is not made in the Existing Households data grid, a standard error dialog is invoked with the text, "A selection is required in the {name of control}".

12.5.2.3.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

12.5.2.3.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

12.5.2.3.4 Check for Enabled Electronic Benefit Transfer (EBT) Food Delivery System

When the above-listed edits are completed successfully, a check is performed to determine whether the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

- If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, a standard message dialog is invoked with the text, "This change to the Household must be communicated to the EBT system. The EBT Household Demographics dialog will open so the data can be sent. The change will only be saved after the successful EBT communication." When the OK button on the message dialog is selected, the EBT Household Demographics dialog defined in Clinic Chapter 11 - Food Instrument Production is invoked.

  o If the EBT Household Demographics dialog is canceled, or the demographics information cannot be transmitted successfully, the Changing the Household ID process is terminated, the Select Existing Household dialog is dismissed, and a standard error dialog is invoked with the text, "The change was not saved because the EBT communication was canceled." When the error dialog is dismissed, focus is returned to the Change Household ID dialog.

  o If the EBT Household Demographics dialog is processed and the demographics information is transmitted successfully, focus is returned to the Select Existing Household dialog and the Changing the Household ID process is continued as detailed in the Change Household ID section below.

- If the Electronic Benefit Transfer (EBT) food delivery system is not enabled for the clinic, the Changing the Household ID process is continued as detailed in the Change Household ID section below.

12.5.2.3.5 Change Household ID

When the above-listed edits are completed successfully, and no errors are found:

- The Household-ID table of the MEMBER table for the participant is set to the Household ID of the household selected on the Existing Households data grid.

- The Select Existing Household dialog is dismissed, and focus is returned to the Change Household ID dialog.

12.6 Create New Household

The Create New Household dialog accepts the entry of information for a new household to which the participant will be assigned. It is invoked when the user selects the Create New Household button on the Change Household ID dialog.

Figure 6 - Create New Household Dialog

12.6.1 Controls

This section describes the behavior of the controls on the Create New Household dialog.

12.6.1.1 Residence Address Text Box (Address)

The control accepts the entry of the residence address of the participant. It is enabled when the dialog is active. It will force all entered characters to upper case. The maximum length allowed for the value is fifty (50) characters. It is initially blank.

12.6.1.2 Residence County Drop-down List (County)

The control allows the user to select the residence county of the participant from a list of valid counties. It is enabled when the dialog is active and a valid 2-character State code has been entered in the Residence State masked edit box. The County Drop-down List will display a sub-set list of counties listed in the County table sub-set by StateCD. When an initial selection is made in County drop-down list, the Residence City drop-down list enabled. When a change is made to the County drop-down list value, the Residence City drop-down list is cleared.

12.6.1.3 Residence City Drop-down List (City)

The control allows the user to select the residence city of the participant from a list of valid municipalities. It is enabled when the dialog is active and a county is selected in the Residence County drop-down list. The drop-down list will contain a sub-set list of cities listed in the LocalMunicipality table sub-set by the value selected in the Residence County drop-down list. When a change is made to the County drop-down list value, the Residence City value is cleared, and the sub-set of data is refreshed.

12.6.1.4 Residence State Masked Edit Box (State)

The control accepts the entry of the residence state of the participant. It is enabled when the dialog is active. It allows the entry of alphabetic characters. It will convert all characters to upper case. The mask for the box is "AA" to allow entry of 2-character State postal code. It will default to the postal code value for your State. When a change is made to the Residence State value, the County and City drop-down lists are cleared.

12.6.1.5 Residence ZIP Code Masked Edit Box (ZIP)

The control accepts the entry of the ZIP code of the participant. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "#####-####" to allow entry of a four digit ZIP extension, if known.

When a value is entered, if the ZIP code is found in the CountyCityByZip table and the following values are blank, the blank values will be automatically populated as follows:

- State masked edit box - the system will populate the State masked edit box with the CountyCityByZip.StateCD.

- County drop-down list - the system will populate the County drop-down list with the County.Name where CountyCityByZip.County = County.HealthCountyID

- City drop-down list - the system will populate the City drop-down list with the LocalMunicipality.Name where CountyCityByZip.County = LocalMunicipality.HealthCountyID and LocalMunicipality.LocalMunicipalityID

If a value exists for the Residence State, County and City and the user enters or modifies the ZIP, the system will not overwrite the previous entry/selection.

When a value is entered, if the ZIP code is not found in the CountyCityByZip table, the system will bypass the automatic update process.

12.6.1.6 Mailing Address Same as Residence Button (Same as Residence)

The control allows the user to copy the residence address, residence city, and residence ZIP code of the participant to the mailing address. The Mailing Address Same as Residence button is enabled when the dialog is active.

12.6.1.7 Mailing Address Text Box (Address)

The control accepts the entry of the mailing address of the participant. It is enabled when the dialog is active. It will force all entered characters to upper case. The maximum length allowed for the value is fifty (50) characters. It is initially blank.

12.6.1.8 Mailing City Text Box (City)

The control accepts the entry of the mailing city of the participant. It is enabled when the dialog is active. It will force all entered characters to upper case. The maximum length allowed for the value is thirty (30) characters. It is initially blank.

12.6.1.9 Mailing State Masked Edit Box (State)

The control accepts the entry of the mailing state of the participant. It is enabled when the dialog is active. It allows the entry of alphabetic characters. The mask for the box is "AA" to allow entry of a State postal code. It will default to a value of your state.

12.6.1.10 Mailing ZIP Code Masked Edit Box (ZIP)

The control allows the user to specify the mailing ZIP code of the participant. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "#####-####" to allow entry of a four digit ZIP extension if known. It is initially blank.

12.6.1.11 How Heard about WIC Drop-down List

The control allows the user to select the method by which the participant first heard about WIC. It is enabled when the dialog is active. The list includes acceptable values for how the participant heard about the WIC program from the reference dictionary table of the lookup database. It is initially blank.

12.6.1.12 Telephone 1 Masked Edit Box

The control accepts the entry of the first telephone number at which the participant may be reached. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "###-###-####" to allow entry of an area code and seven digit telephone number. The area code portion of this box will default from the established Clinic defaults.

12.6.1.13 Telephone 1 Comment Text Box (Comment)

The control allows the user to specify any clarifying information about the first telephone number of the participant. It is enabled when the dialog is active. The maximum length allowed for the value is thirty (30) characters. It is initially blank.

12.6.1.14 Telephone 2 Masked Edit Box

The control accepts the entry of the second telephone number at which the participant may be reached. It is enabled when the dialog is active. It allows the entry of numeric characters. The mask for the box is "###-###-####" to allow entry of an area code and seven digit telephone number. The area code portion of this box will default from the established Clinic defaults.

12.6.1.15 Telephone 2 Comment Text Box (Comment)

The control accepts the entry of any clarifying information about the second telephone number of the participant. It is enabled when the dialog is active. The maximum length allowed for the value is thirty (30) characters. It is initially blank.

12.6.1.16 Language 1 Drop-down List

The control allows the user to select the primary language of the participant. It is enabled when the dialog is active. The list includes languages from the reference dictionary table of the lookup database. The drop-down list will default to the default language specified for the Clinic.

12.6.1.17 Language 1 Read Check Box (Read)

The control allows the user to indicate that the participant reads the primary language. It is enabled when the dialog is active. It defaults to selected.

12.6.1.18 Language 1 Spoken Check Box (Spoken)

The control allows the user to indicate that the participant speaks the primary language. It is enabled when the dialog is active. It defaults to selected.

12.6.1.19 Language 2 Drop-down List

The control allows the user to select the secondary language of the participant, if applicable. It is enabled when the dialog is active. The list includes languages from the reference dictionary table of the lookup database. It is initially blank.

12.6.1.20 Language 2 Read Check Box (Read)

The control allows the user to indicate that the participant reads the secondary language. It is enabled when the secondary language is selected in the Language 2 drop-down list. It defaults to cleared.

12.6.1.21 Language 2 Spoken Check Box (Spoken)

The control allows the user to indicate that the participant speaks the secondary language. It is enabled when the secondary language is selected in the Language 2 drop-down list. It defaults to cleared.

12.6.1.22 Need Interpreter Check Box

The control allows the user to indicate that an interpreter is needed for encounters with the participant. It is enabled when the dialog is active. It defaults to cleared.

12.6.1.23 Reason for ID Change Drop-down List

The control allows the user to select the reason the Household ID of the participant is being changed. It is enabled when the dialog is active. The list includes valid reasons to change the Household ID of the participant from the reference dictionary table of the lookup database. It defaults to blank.

12.6.1.24 OK Button

The control processes the dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the Consistencies chapter.

12.6.1.25 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

12.6.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create New Household dialog.

12.6.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Create New Household"

- The following values will initially be blank:

    o Residence Address

    o Residence County

    o Residence City

    o Residence ZIP

    o Mailing Address

    o Mailing City

    o Mailing ZIP

    o How Heard about WIC

    o Telephone 1

    o Comment

    o Telephone 2

    o Comment

    o Household Language 2

    o Read check box

    o Spoken check box

    o Need Interpreter check box

    o Reason for ID Change drop-down list

- The Language 1 value is populated with the default value defined for Language for the specified Clinic selected when the user logged into the application (Refer to Clinic Settings in Application Administration Chapter 01 - System Administration). If the default value for Language is not defined for the Clinic, the value will initially be blank.

- Read check box for Language 1 is checked

- Spoken check box for Language 1 is checked

- The Mailing State defaults to the State defined in the State Profile table.

12.6.2.2 Changing the Household ID

When the OK button is selected, the following processes are started:

12.6.2.2.1 Verify Required Information

A check is performed to ensure required information is provided:

- If the following drop-down lists do not contain a value, a standard error dialog is invoked with the text, "A selection is required for the {name of control}".

  o Residence County drop-down list

  o Residence City drop-down list

  o Reason for ID Change drop-down list

- If the following controls do not contain a value, a standard error dialog is invoked with the text, "An entry is required in the {name of control}".

  o Residence Address text box

  o Residence ZIP Code masked edit box

  o Mailing Address text box

  o Mailing City text box

  o Mailing State text box

  o Mailing ZIP Code masked edit box

12.6.2.2.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- If the following controls contain an incomplete telephone number (less than 10 digits), a standard error dialog is invoked with the text, "The {name of control} is invalid."

  o Telephone 1

  o Telephone 2

- If the following controls contain an incomplete ZIP code (less than 5 or, if part of the four-digit extension is include, 9 digits), a standard error dialog is invoked with the text, "The {name of control} is invalid."

  o Residence ZIP Code

   o Mailing ZIP Code

12.6.2.2.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

12.6.2.2.4 Check for Enabled Electronic Benefit Transfer (EBT) Food Delivery System

When the above-listed edits are completed successfully, a check is performed to determine whether the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of Application Administration Chapter 09 - Reference Utility.)

- If the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic, a standard message dialog is invoked with the text, "This change to the Household must be communicated to the EBT system. The EBT Household Demographics dialog will open so the data can be sent. The change will only be saved after the successful EBT communication." When the OK button on the message dialog is selected, the EBT Household Demographics dialog defined in Clinic Chapter 11 - Food Instrument Production is invoked.

  - o If the EBT Household Demographics dialog is canceled, or the demographics information cannot be transmitted successfully, the Changing the Household ID process is terminated, the Create New Household dialog is dismissed, and a standard error dialog is invoked with the text, "The change was not saved because the EBT communication was canceled." When the error dialog is dismissed, focus is returned to the Change Household ID dialog.

  - o If the EBT Household Demographics dialog is processed and the demographics information is transmitted successfully, focus is returned to the Create New Household dialog and the Changing the Household ID process is continued as detailed in the Change Household ID section below.

- If the Electronic Benefit Transfer (EBT) food delivery system is not enabled for the clinic, the Changing the Household ID process is continued as detailed in the Change Household ID section below.

12.6.2.2.5 Change Household ID

When the above-listed edits are completed successfully, and no errors are found:

- A new household is created using the information captured on the Create New Household dialog and the next available Household ID.

- The Household-ID column of the MEMBER table for the participant is set to the new Household ID.

- The Create New Household dialog is dismissed, and focus is returned to the Change Household ID dialog.

12.6.2.3 Data Map

Control Label	Table	Column	Business Rule
HouseHoldID (system generated)	Household Member	HouseholdID	
(Residence) Address	Household	Address	
(Residence) County	Household	County	
(Residence) City	Household	LegalMunicipality & LocalMunicipality	
(Residence) State	Household	State	
(Residence) ZIP	Household	ZIP	
Mailing Address	Household	MailAddress	
Mailing City	Household	MailCity	
Mailing State	Household	MailState	
Mailing ZIP	Household	MailZIP	
How Heard about WIC	Household	HowHeardAboutWIC	
Telephone 1	Household	Telephone1	
Comment (1)	Household	Comment1	
Telephone 2	Household	Telephone2	
Comment (2)	Household	Comment2	

Control Label	Table	Column	Business Rule
Language 1	Household	Language1	
Read (1)	Household	Language1Read	
Spoken (1)	Household	Language1Spoken	
Language (2)	Household	Language2	
Read (2)	Household	Language2Read	
Need Interpreter	Household	InterpreterNeeded	

12.7 Void/Replace Benefits for EBT Account

The Void/Replace Benefits for EBT Account dialog allows the user to view and change the suggested household benefit totals. It is invoked when the user selects the Remove Current Benefits link on the EBT Household Change Guided Script dialog.

Figure 7 – Void/Replace Benefits for EBT Account Dialog

12.7.1 Controls

This section describes the behavior of the controls on the Void/Replace Benefits for EBT Account dialog.

12.7.1.1 Household ID Text and Value Label

The control displays the Household ID of the household from which the participant is transferring. The value label will be filled with the value of the Household-ID column of the MEMBER table. The value displays in the inverse color of the form.

12.7.1.2 Primary Cardholder Text and Value Label

The control displays the Primary Cardholder Name and State WIC ID of the household from which the participant is transferring. The value label will be filled with the value of the State WIC ID column of the MEMBER table. The value displays in the inverse color of the form.

12.7.1.3 State WIC ID Display Grid

The control displays the members of the household from which the participant is transferring. It includes the following columns:

- State WIC ID

- Name

- Card Number

The grid will contain an entry for each participant included in the household. The entries will be sorted in ascending order according to the value in the State WIC ID column. The data in the grid is read-only.

12.7.1.4 Benefits for Current Month Display Grid

The control displays the benefits for the household from which the participant is transferring. It includes the following columns:

- Food

- Issued

- Remaining

- Returned

- UOM

The grid will contain an entry for each food item benefit issued to the household in the current month. The entries will be sorted in ascending order according to the category/subcategory value in the Food column. The data in the grid is read-only.

12.7.1.5 Benefits to Remove for Current Month Display Grid

The control displays the benefits available for transfer to the participant's new household. It includes the following columns:

- Category

- SubCategory

- Quantity

- UOM

The grid will contain an entry for each food item benefit that can be voided from the initial household and transferred to the new household. The entries will be sorted in ascending order according to the value in the Category column. The data in the Category, SubCategory, and UOM columns is read-only.

The data in the Quantity column can be modified by the user. This column contains the suggested number of benefits to be removed from the initial household for the current month. Benefits removed from here will transfer with the participant to the new household.

12.7.1.6 Reset Button

The Reset button is enabled when any changes have been made to the Void/Replace Benefits for EBT Account dialog. It allows the user to revert those changes. It does not have a mnemonic.

12.7.1.7 Send EBT Data Button

The Send EBT Data button is enabled when the Void/Replace Benefits for EBT Account dialog is active. It does not have a mnemonic. It allows the user to negotiate a connection with the online EBT system, execute the transaction, and then save the data changes to the SPIRIT database upon success. A failure in the communication displays a message in the Status text label and value and a message box that details the error.

12.7.1.8 Cancel Button

The Cancel button is enabled when the Void/Replace Benefits for EBT Account dialog is active. Characteristics for the Cancel button are defined in the Consistencies chapter.

12.7.1.9 Status Text Label and Value

The control displays the status of the dialog. The value displays in the inverse color of the form.

12.7.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Void/Replace Benefits for EBT Account dialog.

12.7.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text will be set to "Void/Replace Benefits for EBT Account".

- The Household ID value label is populated from the Member.HouseholdID for the participant.

- The Primary Cardholder value label is populated from Member.StateWicID for the primary cardholder.

- The Benefits for Current Month display grid is populated from the FoodInstrumentItemDetail table for the household.

- The Benefits to Remove for Current Month display grid is populated as follows:

- The system determines the balance available for transfer by counting the number of participants that were issued benefits in the category/subcategory and then dividing the quantity remaining by this count. The value is then rounded down.

- The number of benefits available to the transferring participant is removed from the aggregated household total and the Quantity column displays the suggested household update.

- The Reset, Send EBT Data, and Cancel buttons are displayed.

12.7.2.2 Edits

Edits are not required in the Void/Replace Benefits for EBT Account dialog; however, the user may choose to override the suggested quantities for transfer.

Upon successful communication with the EBT system, the SPIRIT system will perform the following steps:

- The amount of food voided will become available for inclusion in the new household.

- Prior to benefit communications, maximum and minimum quantities issued or voided will be validated ensuring that over or under issuance has not occurred.

- The amount transferring with the participant will be recorded in the HouseholdChangeEBT table.

- The removal of future benefits will automatically be calculated.

12.7.2.3 Send EBT Data

When the Send EBT Data button is selected, the following processes are started:

12.7.2.3.1 Verify Required Information

A check is performed to ensure required information is provided:

- No values are considered required.

12.7.2.3.2 Verify Legitimate Values

When the above-listed edits are completed successfully, a check is performed to ensure the information provided is legitimate:

- All values are considered legitimate.

12.7.2.3.3 Perform Cross-edits

When the above-listed edits are completed successfully, a check is performed to ensure all cross-edits are met:

- No cross-edits are required.

12.7.2.3.4 Send EBT Data to the J.P. Morgan System

When the above-listed edits are completed successfully, and no errors are found:

- The Send EBT Data button is disabled so that a user cannot activate the request a second time.

- The operation data is collected and a request passed to the SPIRIT Web Service.

- The timeout period is read from the State Business Rules (EBT_CONNECTION_TIMEOUT).

- The transaction beings, logging data into the EBT Transaction table in the SPIRIT database. When the process starts, the Status text value is updated to display the progress.

- The SPIRIT Web Service attempts to establish a connection to the online J.P. Morgan system.

- When the process is completed successfully, quantities defined in the Void/Replace Benefits for EBT Account dialog will be saved to the SPIRIT database.

- If the process is not completed successfully, an error message will display in the Status text. The quantities defined in the Void/Replace Benefits for EBT Account dialog will not be saved to the SPIRIT database.

12.7.2.4 Reset

Upon selection of the Reset button, the system will revert any changes made in the Quantity column of the Benefits to Remove for Current Month display grid to their initial settings.

12.7.2.5 Cancel

Upon selection of the Cancel button, the system will dismiss the Void/Replace Benefits for EBT Account dialog and return to the EBT Household Change Guided Script window without invoking edit routines or saving any changed data.

12.8 Manually Terminate Participant

The Manually Terminate Participant dialog allows the user to manually terminate an active certification period for the participant. It is invoked when the user selects the Manually Terminate Participant menu item from the Participant Activities menu.
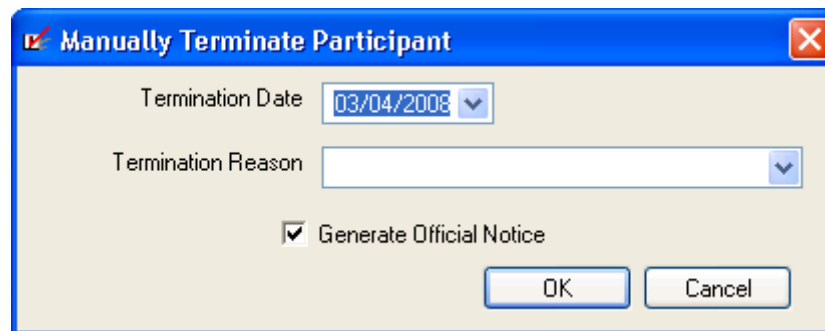

Figure 8 - Manually Terminate Participant Dialog

12.8.1 Controls

This section describes the behavior of the controls on the Manually Terminate Participant dialog.

12.8.1.1 Termination Date Masked Edit Box

The control accepts the entry of the date on which the participant will be terminated. It is enabled when the dialog is active. It accepts the entry of numeric characters. The mask on the box is "##/##/####" to accept a date with a four digit year.

The string entered must be a valid date in the format of MM/DD/CCYY. If an invalid date is entered, a standard error dialog is invoked with the text, "Invalid date entered."

12.8.1.2 Termination Reason Drop-down List

The control allows the user to select the reason why the participant is being manually terminated. It is enabled when the dialog is active. It will be filled with a list of reasons for manual termination from the reference dictionary table of the lookup database.

12.8.1.3 Generate Official Notice Check Box

The control allows the user to generate an official notification for the participant. It is enabled when the dialog is active.

12.8.1.4 OK Button

The control processes the dialog. It is enabled when the dialog is active. Characteristics for the OK button are defined in the <u>Consistencies</u> chapter.

12.8.1.5 Cancel Button

The control dismisses the dialog. It is enabled when the dialog is active. Characteristics for the Cancel button are defined in the <u>Consistencies</u> chapter.

12.8.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Manually Terminate Participant dialog.

12.8.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Manually Terminate Participant"
- The Terminated Date will default to the current system date.
- The Terminated Reason drop-down list will be blank.
- The Generate Official Notice check box will be marked.

12.8.2.2 Edits

When the OK button is selected, a check is performed to verify that values have been entered in the following controls:

- Termination Date masked edit box
- Termination Reason drop-down list

If an entry is not made in an above-listed control, a standard error dialog is invoked with the text, "An entry is required for the {control label}".

When the edits listed above have been completed successfully, a check is performed to verify that legitimate values are entered in the controls as follows:

- The value of the Termination Date masked edit box must be a date equal to or greater than the current system date.
- The value of the Termination Date masked edit box must be a date less than or equal to the ending date of the current certification period for the participant.

If the above date edits are not met a standard error dialog is invoked with the text, "Termination date must be a date equal to or greater than current date and less than or equal to the ending date of the current certification period."

12.8.2.3 Terminate Participant

When the OK button is selected, the participant's current certification is terminated. The participant is now considered terminated and not in a valid certification period. The system will exit the Manually Terminate Participant dialog and return to the Participant Folder.

12.8.2.4 Generate Official Notice

When the OK button is selected, if Generate Official Notice is checked:

- If the Household.CorrespondenceLanguage = 'S' (Spanish), the system will generate the Official Notification in Spanish defined in System Outputs Chapter 01 – System Outputs.

- If the Household.CorrespondenceLanguage = 'E' (English) the system will generate the Official Notification in English defined in System Outputs Chapter 01 – System Outputs.

- The system will send the generated notice to the selected output printer (see *System Tools*).

12.8.2.5 Data Map

Control Label	Table	Column	Business Rule
Terminated Date	CertContact Member	CertTermDate TerminatedDate	
Termination Reason	CertContact	CertTermReason	
Generate Official Notice	CertContact	CreateTerminatio nNotice (=Y when notice is produced)	
Terminated (system generated)	Member	Terminated (=Y when participant is terminated)	
VOCDocument(sy stem generated)	Member	VOCDocument (=N when participant is terminated)	

12.9 Reinstate Terminated Participant

The Reinstate Terminated Participant dialog allows the user to reinstate a participant who was terminated during a certification period that has not yet expired. It is invoked when the user selects the Reinstate Terminated Participant menu item from the Participant Activities Menu.
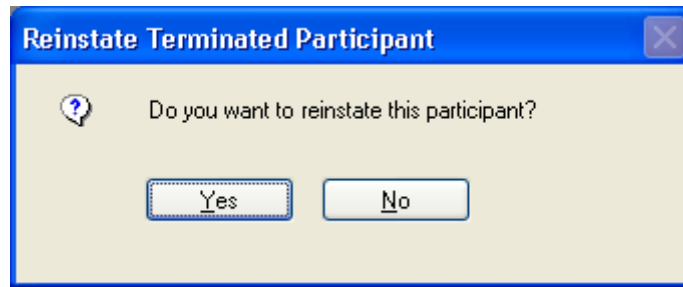

Figure 9 - Reinstate Terminated Participant Message Box

12.9.1 Controls

This section describes the behavior of the controls on the Reinstate Terminated Participant dialog.

12.9.1.1 Yes Button

The control allows the user to confirm that the participant should be reinstated. The Yes button is enabled when the dialog is active. Its mnemonic is "Y" and is the default button for the dialog.

12.9.1.2 No Button

The control allows the user to exit the Reinstate Terminated Participant dialog without reinstating the participant. The No button is enabled when the dialog is active. Its mnemonic is "N" and is the cancel button for the dialog.

12.9.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Reinstate Terminated Participant dialog.

12.9.2.1 Initializing the Interface

When the dialog is invoked:

- The title bar text is set to "Reinstate Terminated Participant"

- The Yes button will be initially selected

12.9.2.2 Reinstate Participant

When the Yes button is selected, the participant is reinstated and the certification period is validated.

12.9.2.3 Data Map

Control Label	Table	Column	Business Rule
Terminated Date	CertContact Member	CertTermDate (value will be cleared) TerminatedDate(value will be cleared)	
Termination Reason	CertContact	CertTermReason (value will be cleared)	
Terminated (system generated	Member	Terminated(value will be cleared)	
VOCDocument(system generated	Member	VOCDocument (=Y when participant is reinstated)	